

NEUBERGER, QUINN, GIELEN, RUBIN & GIBBER, P.A.

27th Floor
One South Street
Baltimore, MD 21202-3201
(410) 332-8550

Bryan H. Potts, Esquire
201 North Charles Street
Suite 500
Baltimore, MD 21201

December 01, 2013
Page #: 1
Client: 002221
Matter: 000016
Invoice #: 138896

RE: Neal Potts Trust U/A 11/29/90

For Professional Services Rendered through November 30, 2013

Services

Date	Pers	Description
7/17/2012	MCM	Conference with Bryan; follow-up emails to Vicki and Phyllis; review files.
8/1/2012	MCM	E-mail follow-up re documents.
8/13/2012	MCM	Enter transactions into fiduciary accounting system from Bryan H.Potts records.
8/15/2012	MCM	Review and respond to emails from Moshe Shurin; review returns and income information; revise accounting.
8/28/2012	MCM	Conference re trusts' records; email Vicky re same.
8/31/2012	MCM	Prepare for meeting; conference re trusts and accepting trustee appointment.
9/28/2012	MCM	Organize file; work on accounting; review and respond to emails from accountant.
10/8/2012	MCM	Work on Accounting.
10/9/2012	MCM	Work on accounting.
10/10/2012	MCM	Work on Accounting.
10/11/2012	MCM	Work on accounting.
10/15/2012	MCM	Conference with Bryan; revise accounting; review Gamber schedule; reconcile same; prepare email re same.
10/18/2012	MCM	Complete accountings; calculate commissions; prepare email re same.
10/23/2012	MCM	Review and respond to emails re status.
11/1/2012	MCM	Prepare for meeting; revise Accountings; telephone conference with Bryan.

Services

Date	Pers	Description
11/2/2012	MCM	Prepare for and attend meeting; follow-up.
11/13/2012	MCM	Revise accountings; prepare e-mail to Moshe Shevin re tax returns; prepare e-mail to Ellie.
12/6/2012	MCM	Conference re accounting and follow-up to Ellie's demand letter; conference with Bryan and Phillip re same.
12/10/2012	MCM	Review and respond to email from Moshe Shurin; Review and respond to email from Moshe Shurin.
12/11/2012	MCM	Review and respond to emails from accountant.
12/13/2012	MCM	Respond to settlement proposal.
12/20/2012	MCM	Review and respond to emails from accountant re tax issues.
12/26/2012	MCM	Telephone conference with Ellie Lipsitz re settlement; prepare email.
2/26/2013	MCM	Conference with Bryan re signing of tax returns; prepare email to Ellie re follow-up.
2/27/2013	MCM	Conference re taxes; file tax returns; email K-1s.
4/8/2013	MCM	Telephone conference with Moshe Shurin re income tax returns; prepare email to Bryan re same.
4/19/2013	MCM	Review and respond to emails.
5/2/2013	MCM	Follow-up emails re Neal and attorney.
5/14/2013	MCM	Prepare email re status.
5/15/2013	MCM	Follow-up email to Neal's counsel.
5/23/2013	MCM	Review and respond to letter from Amy Kline.
5/29/2013	MCM	Telephone call from Vicky Wyatt; telephone call to Vicky Wyatt.
6/3/2013	MCM	Review and respond to email from Moshe Shurin re tax issues.
6/5/2013	MCM	Conferences re letter from Amy Kline; review files.
6/5/2013	NMG	Conference with M. Muffoletto re demand letter from Amy Klein re Neil Potts trusts and documents. Review demand letter, file and work product from litigation with A. Potts in 2009. Review Federal Rules re pre-filing discovery and Rule 26 hearing. Conference with M. Muffolotto re strategy and outline of issues. Conference call with P. Potts and M. Muffoletto re issues and strategy. Draft email to B. Potts re same. Telephone call to A. Klein - left message.
6/6/2013	MCM	Conferences re document request; review file.
6/6/2013	NMG	Conference call with Amy Kline re discussion of demand letter, issues in case and potential resolution. Conference with M. Muffoletto re same.
6/7/2013	MCM	Review and respond to emails re records; conference with Nichole Galvin re Neal; prepare email to Bryan and Phillip.

Services

Date	Pers	Description
7/1/2013	NMG	Conference with M. Muffoletto re N. Potts' request for distribution.
7/2/2013	MCM	Review and respond to email; conference with Nichole Galvin re: distribution request.
7/3/2013	NMG	Telephone call to A. Klein re N. Potts' request to trustee for distribution--left message. Draft email to A. Klein re same.
7/10/2013	MCM	Conference re e-mails and lawsuit; review e-mails; prepare e-mails re same.
7/10/2013	NMG	Emails to/from A. Klein re N. Potts' request for distribution, dispute, and lawsuit filed. Draft email to M. Muffoletto re same.
7/22/2013	NMG	Search Pacer for new lawsuit. Review email from client re federal express copy of lawsuit and request for consent to accept service. Draft email to client with copy of lawsuit. Conference with M. Muffoletto re same. Review lawsuit.
7/23/2013	MCM	Conferences and emails re lawsuit.
7/23/2013	NMG	Telephone call from J. Shuster re lawsuit and strategy. Review emails from client re meeting.
7/25/2013	MCM	Conference re lawsuit.
7/25/2013	NMG	Prepare for meeting with clients. Review file re research, causes of action, settlement and issues relevant to complaint. Meeting with clients. Conference with M. Muffoletto re same. Research re cause of action in complaint, duty of trustee, ethical obligations of attorney/trustee and defenses.
7/26/2013	NMG	Research re response to complaint, causes of action against trustee and other grounds to dismiss complaint; Telephone call from J. Shuster re settlement with A. Klein. Conference call with M. Muffoletto re same.
7/29/2013	NMG	Review letter from J. Shuster to A. Klein. Email to Shuster re tolling agreement. Telephone call from Shuster re tolling agreement and strategy re same. Review research re equitable claims against trustee and related cases. Research re ethical issues. Emails to/from client re meeting with A. Graham. Meeting with client and A. Graham re trustee issues and lawsuit.
8/23/2013	NMG	Conference with M. Muffoletto re N. Smith and status of Potts; Telephone call to N. Smith re Potts.
8/28/2013	MCM	Review and respond to emails re funds; telephone call to Norman Smith; prepare email to Keith Dorsey re accounting.
8/30/2013	MCM	Conferences re representation.
9/6/2013	TMW	Review complaint; conference with m. Muffoletto; review letter to insurance company.
9/6/2013	MCM	Prepare for meeting with accountant; attend meeting with accountant.

Services

Date	Pers	Description
9/9/2013	TMW	Review e-mail from B. Potts re: insurance; review Smith letter; telephone call with M. Muffoletto re: insurance; telephone calls with insurance adjuster; conference with M. Muffoletto.
9/9/2013	MCM	Conferences re CNA representation; telephone conference with Alicia's attorney.
9/10/2013	TMW	Review case law re: independent counsel; conference with M. Muffoletto.
9/10/2013	MCM	Conference re CNA; research and email Bryan.
9/11/2013	TMW	Conference with B. Boyle re: defense issue; conference with M. Muffoletto; review letter; draft letter re: coverage.
9/11/2013	BMB	Conferences with Sam Wood re: coverage issues; review case law and treatises re: same.
9/11/2013	MCM	Conference with Bryan re letter; revise and email same.
9/13/2013	MCM	Telephone conference with accountant.
9/17/2013	NMG	Conference with M. Muffoletto re status of Potts and CNA. Review letter re same.
9/18/2013	MCM	Conference with Bryan re CNA and Motion for Default; Prepare emails re statements.
9/19/2013	TMW	Draft and revise letter re: default; review and revise letter to insurance company.
9/19/2013	MCM	Conference with Bryan and Sam Wood; prepare letter to CNA; telephone conference with Norman Smith; conference re Motion.
9/20/2013	MCM	Conference with Bryan re Complaint.
9/23/2013	MCM	Review and forward emails.
9/24/2013	MCM	Review and respond to email from Vicky; Review email; conference with Sam Wood re same.
9/25/2013	MCM	Conference re request for funds.
9/25/2013	NMG	Review email from M. Muffoletto re Neil's request for additional disbursements. Conference with M. Muffoletto re same.
9/26/2013	MCM	Review and respond to emails.
9/30/2013	MCM	Conference re Complaint service; Prepare email re statements.
10/1/2013	MCM	Review and respond to CNA email.
10/2/2013	MCM	Review email; conference re same.
10/3/2013	MCM	Telephone conference re representation.
10/3/2013	NMG	Conference with M. Muffoletto re CNA issues. Conference call with M. Muffoletto and Norman Smith re representation of B. Potts. Conference call with B. Potts and M. Muffoletto re same.
10/16/2013	MCM	Work on trust accounting.

Services

Date	Pers	Description
10/17/2013	MCM	Conferences with Bryan re accounting; call to Vicky re taxes.
10/21/2013	MCM	Conference with retained counsel in lawsuit re Neal's Trusts; prepare for meeting.
10/21/2013	NMG	Meeting with Norman Smith and David Schuster re Potts Litigation and trust issues.
10/24/2013	MCM	Telephone conference with David Shuster; prepare emails to David.
10/29/2013	MCM	Telephone conference with Dave Shuster and Norman Smith re meetings; telephone conference with Dave re follow-up.
10/30/2013	MCM	Conferences re accountings, statements, etc.; prepare check; Telephone conference with David Shuster re repayment of loan and stipend; review and respond to emails.
10/31/2013	MCM	Conference with Keith Dorsey re accounting; prepare emails to Vicky re accounts; Telephone conferences with Dave Shuster re follow-up.
11/4/2013	MCM	Review accountings; telephone call to Keith Dorsey; prepare email to David Shuster.
11/6/2013	MCM	Conference with Dave Shuster, Norman Smith and Lauren McComas re settlement and accounting; prepare for meeting.
11/6/2013	NMG	Prepare for strategy session with counsel. Review confidential settlement agreement. Draft letter to N. Smith and D. Shuster regarding confidential settlement agreement. Meeting with M. Muffoletto, D. Shuster and N. Smith re strategy for settlement, account and response to complaint.
11/8/2013	MCM	Review and respond to email.
11/12/2013	MCM	Review and respond to emails; conference with counsel to trustees re preparation for settlement meeting.
11/13/2013	MCM	Work on allocation; telephone conferences with Keith Dorsey re accounting; review and respond to emails.
11/14/2013	MCM	Conferences re settlement conference and preparation for same; prepare settlement spreadsheet.
11/14/2013	NMG	Review Shuster's draft memorandum. Review settlement worksheet. Review provisions of Frieda Potts Insurance Trust and Final Administration Account in Bernard Potts' Estate. Conference with M. Muffoletto re Cross Keys property. Review Goodlow Trust, trust provisions and land records regarding Cross Keys property. Conference with M. Muffoletto and D. Shuster regarding strategy re same. Review accounting and settlement spreadhseet. Review letter from A. Kline re settlement meeting.
11/15/2013	MCM	Conference with David Schuster and Norman South re Amy Kline letter; prepare e-mail re accountings.
11/15/2013	NMG	Review accounting. Review trust provisions in anticipation of settlement conference. Conference with M. Muffoletto re same. Review emails re disclaimer.

Services

Date	Pers	Description
11/18/2013	MCM	Conferences re settlement issues; review and respond to e-mails.
11/18/2013	NMG	Prepare for settlement meeting re review powers under each trust agreement and identities of contingent remainder beneficiaries. Meeting with D. Shuster, N. Smith and M. Muffoletto re settlement meeting. Follow up meeting re strategy.
11/19/2013	NMG	Review draft settlement agreement and provide comments and revisions. Review file re confidentiality provision. Conference with M. Muffoletto re same.
11/20/2013	MCM	Review e-mails re settlement; respond to same.
11/20/2013	NMG	Review revised draft settlement agreement. Conference with M. Muffoletto re same.

Total Services	\$45,565.00
Less Courtesy Discount	(\$8,169.67)
Net Services	\$37,395.33

Disbursements

9/4/2012	Courthouse Copy Services, Inc.- Photocopying- photocopies	\$125.25
10/2/2012	Courthouse Copy Services, Inc.- Photocopying- Standard Litigation	\$32.90
2/27/2013	Postage Expense	\$4.48
9/30/2013	Computerized Legal Research	\$181.59
10/21/2013	Photocopying	\$32.30

Total Disbursements	\$376.52
----------------------------	-----------------

Current Charges	\$37,771.85
Total Balance Now Due	\$37,771.85